

AMENDMENTS TO THE CLAIMS

This listing of claims will replace all prior versions, and listings, of claims in the application:

1. (Currently Amended) A method for facilitating generation of an agreement document associated with [an] a financial transaction agreement between a party and a counter-party, comprising:

receiving agreement information from a user associated with the party, the agreement information including (i) a counter-party communication address and (ii) information about a financial product associated with the financial transaction agreement;

determining an agreement scope, a document scope, and a fact set scope;

placing the determined agreement scope, document scope, and fact set scope in a scope stack;

evaluating the scope stack via an evaluation engine to produce a result in accordance with a rule;

~~determining agreement information;~~

generating the agreement document in accordance with the ~~agreement~~ information about the financial product, a covered products matrix, and the result; and

~~arranging for the agreement document to be received by at least one of the party and the counter-party~~

automatically transmitting the agreement document to the counter-party via the counter-party communication address.

2. (Canceled)

3. (Currently Amended) The method of claim [2] 1 , wherein the counter-party communication address comprises at least one of: (i) an electronic mail address, (ii) an Internet address, (iii) a uniform resource locator, and (iv) a telephone number.

4. (Currently Amended) The method of claim 1, ~~wherein said arranging comprises~~ further comprising:

automatically transmitting the agreement document via a communication address associated with the party.

5. (Currently Amended) The method of claim 1, wherein the party is associated with a first party entity and a second party entity, and ~~said arranging comprises~~ further comprising:

transmitting the agreement document via a first communication address associated with at the first party entity;

receiving information from the first party entity; and

transmitting the agreement document via a second communication address associated with ~~at~~ the second party entity.

6. (Original) The method of claim 1, wherein the agreement document comprises at least one of: (i) a final agreement document, and (ii) an amendment to an existing agreement document.

7. (Original) The method of claim 1, wherein the agreement document comprises a preliminary agreement document.

8. (Currently Amended) The method of claim 7, wherein said ~~arranging~~ transmitting comprises automatically transmitting the preliminary agreement document via [a] the counter-party communication address associated with the counter-party, and further comprising:

receiving a revised preliminary agreement document from the counter-party.

9. (Original) The method of claim 8, further comprising:

reconciling the revised preliminary agreement document and the preliminary agreement document; and

generating a final agreement document in accordance with said reconciliation.

10. (Currently Amended) The method of claim 1, where said generating comprises automatically generating a plurality of agreement documents in accordance with the ~~agreement~~ information about the financial product, the covered products matrix, and the result.

11. (Original) The method of claim 1, wherein the agreement information comprises at least one of: (i) an agreement type, (ii) an agreement term, and (iii) an agreement fact.

12. (Currently Amended) The method of claim 1, wherein the agreement comprises a transaction agreement associated with at least one of: (i) a set of rights between the party and the

counter-party, (ii) a legal contract, (iii) a financial instrument, ~~(iv) a financial product~~, and (iv) a monetary amount.

13. (Currently Amended) The method of claim [12] 1, wherein the financial product comprises at least one of: (i) an equity product, (ii) a stock product, (iii) an index product, (iv) a fixed income product, (v) a bond product, (vi) a bank loan product, (vii) a whole loan product, (viii) an interest rate product, (ix) a credit derivative product, (x) a commodity product, (xi) a metal product, (xii) a energy product, and (xiii) an agriculture product.

14. (Currently Amended) The method of claim [12] 1, wherein the ~~financial instrument~~ comprises financial transaction agreement is associated with at least one of: (i) a swap instrument, (ii) an option instrument, (iii) a buy instrument, (iv) a sell instrument, (v) a call instrument, (vi) a put instrument, (vii) a forward instrument, (viii) a pre-paid forward instrument, (ix) a spot instrument, (x) a repurchase agreement instrument, (xi) a loan instrument, (xii) a warrant instrument, and (xiii) a contract for differences instrument.

15. (Currently Amended) The method of claim [12] 1, wherein said generating determining is performed via at least one of: (i) [a] covered product matrix information retrieved from a database, (ii) a pre-stored default transaction term, (iii) information received from a user of an agreement modeling system, (iv) information received from a satellite system, and (v) information received from a legacy agreement system.

16. (Currently Amended) An apparatus for facilitating generation of an agreement document associated with [an] a financial transaction agreement between a party and a counter-party, comprising:

a processor; and

a storage device in communication with said processor and storing instructions adapted to be executed by said processor to:

receive agreement information from a user associated with the party, the agreement information including (i) a counter-party communication address and (ii) information about a financial product associated with the financial transaction agreement,

determine an agreement scope, a document scope, and a fact set scope,

place the determined agreement scope, document scope, and fact set scope in a scope stack,

evaluate the scope stack via an evaluation engine to produce a result in accordance with a rule,

~~determine agreement information,~~

generate the agreement document in accordance with the agreement information about the financial product, a covered products matrix, and the result, and

~~arrange for the agreement document to be received by at least one of the party and the counter-party~~

automatically transmit the agreement document to the counter-party via the counter-party communication address.

17. (Original) The apparatus of claim 16, wherein said storage device further stores an agreement information database.

18. (Original) The apparatus of claim 16, further comprising:

a communication device coupled to said processor and adapted to communicate with at least one of: (i) a client device, (ii) an agreement modeling system controller, (iii) a satellite system, and (iv) a counter-party device.

19. (Currently Amended) A medium storing instructions adapted to be executed by a processor to perform a method of facilitating generation of an agreement document associated with [an] a financial transaction agreement between a party and a counter-party, said method comprising:

receiving agreement information from a user associated with the party, the agreement information including (i) a counter-party communication address and (ii) information about a financial product associated with the financial transaction agreement;

determining an agreement scope, a document scope, and a fact set scope;

placing the determined agreement scope, document scope, and fact set scope in a scope stack;

evaluating the scope stack via an evaluation engine to produce a result in accordance with a rule;

determining agreement information;

generating the agreement document in accordance with the agreement information about the financial product, a covered products matrix, and the result; and

arranging for the agreement document to be received by at least one of the party and the counter-party

automatically transmitting the agreement document to the counter-party via the counter-party communication address.

20-29. (Canceled)